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The Modernization Meal

a.k.a. "Burgers, Subs & Pumpkin Pie"

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MACHINERY
INVENTORY
WHOPPER
FAT GRAMS
BLOB
WHATEVER
BIG BANG
MORE…

Why are we here ?……

- To set the record straight on what modernization really is, or what it should be
- To invalidate false assumptions which have been made for decades
- To challenge age old wisdom, or in some cases lack of wisdom
- To answer the question, "But how will it improve our bottom line ?"
- To NOT get a software sales pitch !!!
- To answer the question "why", not "how"

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Why not "how" ?….

- Because those who know "how" will always work for those who know "why"
- Because those who know "how" will always have their budgets controlled by those who know "why"
- Because those who know "how" will always be hired, evaluated and fired by those who know "why"
- In short, because those who know "how" will always be at the mercy of those who know "why"

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One word, many definitions……

- "Rip it all out and replace it with Java"
- "Rip it all out and replace it with .NET"
- "Rip it all out and replace it with Oracle"
- "I don't care what you do, just get rid of the green screens"
- "If Microsoft says to do it, it must be right"
- Notice how these all revolve around technology, ego and emotions, not people and processes

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One word, many definitions.…

- Those previous examples also fail to consider whether a modernization strategy makes financial sense, so we have a better one…
- "Take stock of your resources. Use them better, use them smarter. Capitalize on your investment in them first, before investing in anything else"
- That's a little more like it
- But why do we modernize, anyway ?

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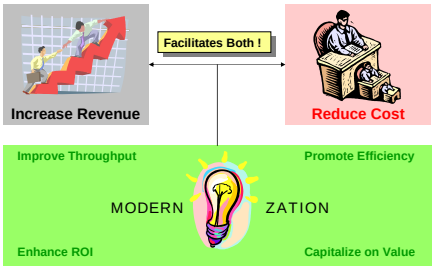
We modernize to improve the bottom line



The green by itself will not buy you a piece of machinery
The absence of green will be your largest impediment to achieving the black or the red

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Take stock of what you have……..

Customers (your single most important asset)
- Want to keep and want to keep happy

People (who know our business)
- Want to keep and want to keep interested, want them to innovate, etc.

Processes (how we do things)
- Want to keep efficient and in compliance

Investments (technology, intellectual property, etc.)
- Want to get more value and ROI from them

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We also have 3 "main courses"…

- Burgers
- Subs
- Pumpkin Pie

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The Burgers…

Feature:	Analogous to:
Fat, juicy heart attacks on a bun	Those 25,000 line abominations with 50 files and 500 GOTO's
Served your way, every day	Kowtowing to every user whim
Rare, medium or well done ?	Some things tested thoroughly, others not so thoroughly
Served with super sized fries and a drink	That bulky 3rd party product you use 10% of at best, and customize mercilessly
A moment on the lips, a lifetime on the hips	One-shot fix programs turned mission critical apps

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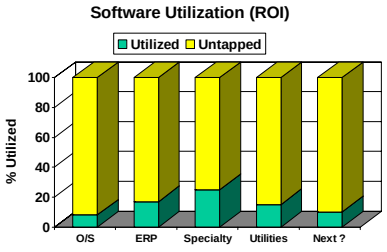
Fat content…..



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Cost of Untapped……..

- Original price of software
- Cost of training & implementation
- Seat licenses
- Annual maintenance
- Support contracts
- Others
- Analogous to buying a 5,000 sq ft house and living in one small room
- This is ROI ?

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Burger Lovers' Modernization…….

- View "promised land" as a destination
- Design a specification based on what you know right now and need right now
- Take inventory of existing applications
- Take inventory of existing resources
- Calculate project duration (blob of time)
- Calculate a budget (blob of money)
- Execute and hopefully come in on time, on budget and to spec

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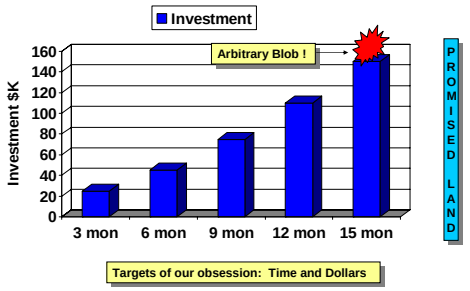
Burger Lovers' Modernization



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Burger Lovers' Modernization…….

Notable quotables:

- "It's MIS's problem !"
- "Just make it look like the old system !"
- "What was wrong with the old system ?"
- "Not my budget !"
- "You're the geeks – you test !"
- "Yeah, whatever !"

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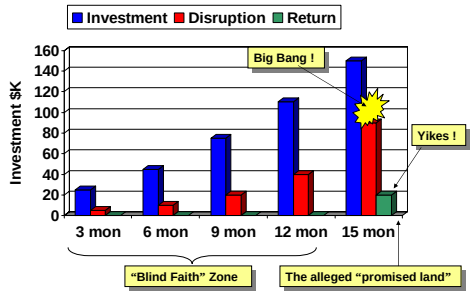

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What about all that disruption……

- Normal day to day improvements put on hold until after project completion
- Specifications get old as the project progresses – climate changes but the spec stays the same
- Users get impatient waiting for improvements and lose enthusiasm
- Management gets impatient waiting for ROI, second guesses investment
- Self appointed CEO's try to derail the project and cost productivity
- And oh, by the way…

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More realistic events…….

- Loss of key personnel
- Organizational shakeup
- Merger/Acquisition (may be good news)
- Significant financial downturn
- Natural disaster (ex. Katrina)
- Civil disaster (ex. 9/11)
- Change of heart on strategic vision

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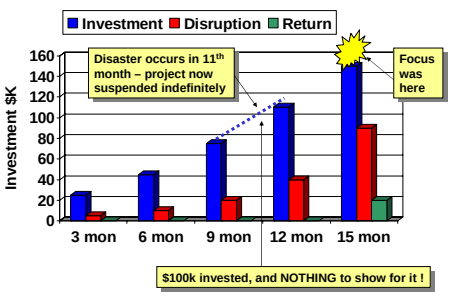

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All this dead money….

- Can't be liquidated
- Can't be used to help alleviated the effects of the disaster
- Has earned us NOTHING in return !
- Some might even have to be re-spent IF and when the project restarts

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Even if the project IS completed……..

There will undoubtedly be disruption:

- "That doesn't look like our old system"
- "That might be what I asked for, but it's not what I wanted"
- "Where's my version of the program ?"
- "Let's go back to the old system !"
- Users spend more time complaining about the new system than learning it
- "I don't care if I approved it – it doesn't work !"
- And it's all MIS's problem – FTFT !
- And that's not all…

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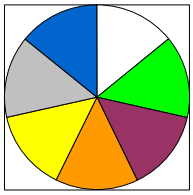
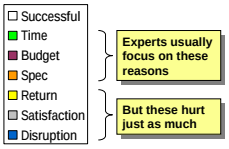
…It could fail !

Why Modernization Projects Fail





A more effective approach would minimize these risks

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The Subs…

Feature:	Analogous to:
Lean, healthy and low in fat	Business logic developed once into easily reusable objects
Served on fresh baked rolls	Latest available technology used to best advantage
Goes down smooth, easy to digest	Steady, staged modernization with little or no disruption
Made from the same ingredients at each location	Using software the way it was designed
Served with baked chips and diet soft drink	Efficient but effective components interfacing well

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Sub Lovers' Modernization……..…

- View "promised land" as a journey, not a destination
- Identity a FEW key benefits based on what you know right now and need right now. Make a business case to justify the benefits.
- Strengthen our data to support these benefits
- Design a solution to allow new versions of a small number of "stronger" database components to co-exist with legacy versions
- Provide mechanisms to synchronize new database objects with legacy objects real time
- Users continue to utilize legacy interfaces without disruption
- Modernize JUST the executables needed to provide the specified benefit
- Test and implement this small subset
- THEN…

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Sub Lovers' Modernization……

- Step back and review
- Identify what worked well and what didn't
- Use lessons learned, tools created and business rules defined in the previous stage, to help define the specification for the next stage
- Also consider any short term climate changes
- Meanwhile, other projects in process can utilize the new objects, since the data is synchronous
- Investment is focused not on arbitrary targets, but rather assuring that disruption is minimized and that ROI is realized early and often

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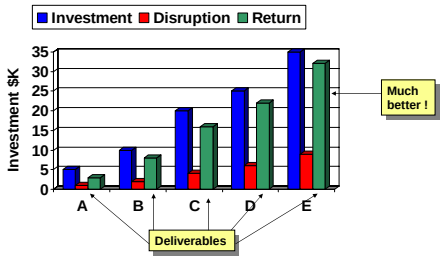

No "promised land", just steps on the journey.

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Making our data STRONG !!!.....

What do we mean by that ?

- Your data is your most valuable IT asset – the concrete footer on which apps are built
- Does your data cramp your style ?
- Does it play nicely with apps on other systems ?
- Does it enforce your business rules ?
- Is it self cleaning ?
- Is it self healing ?

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Making our data STRONG !!!.....

Remember - A high powered application written over weak data is a weak application

- Use data types that do some of the work for you (date, time, timestamp, varchar, etc.)
- Use constraints to enforce your business rules no matter how the data gets there
- Use triggers to keep your workflow consistent no matter how the data gets there
- Use SQL functions and procedures to share your business rules with other applications
- Hint - Stop using DDS to build files !!!
- Hint II – there is more to a database than just data

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Simple real life example: Master Files……

- Insurance agent with LEGACY custom apps (most of which operated in S/36 environment)
- Many data files were not externally defined
- Three different types of customers – industrial, service and governmental. Each had its own Customer Master with its own specialized "fields".
- Seeking the benefit of an audit trail against these files, and a way to simplify user queries
- Willing to consolidate the files to facilitate modernization.
- Consider…

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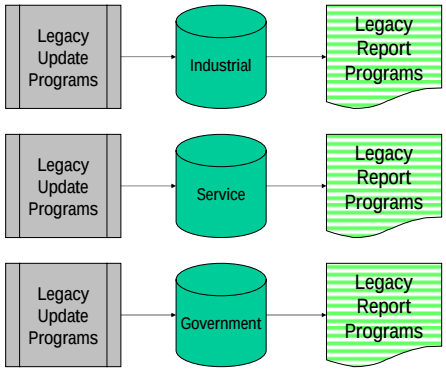

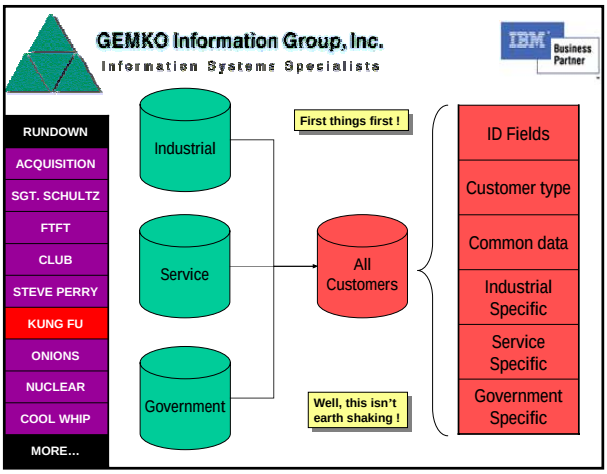
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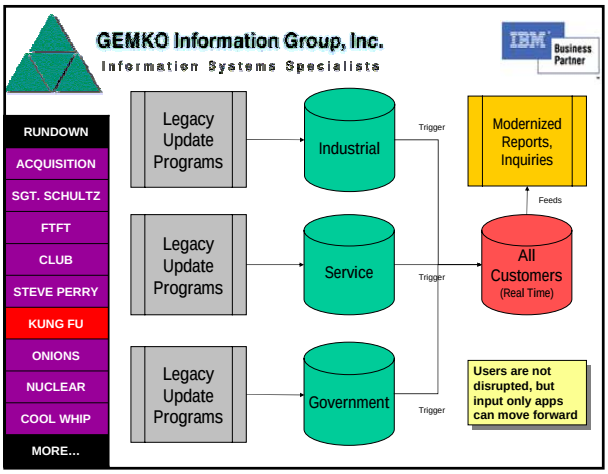
MORE…
Industrial
Service
Government
First things first !
All Customers
Well, this isn't earth shaking !
ID Fields
Customer type
Common data
Industrial Specific
Service Specific
Government Specific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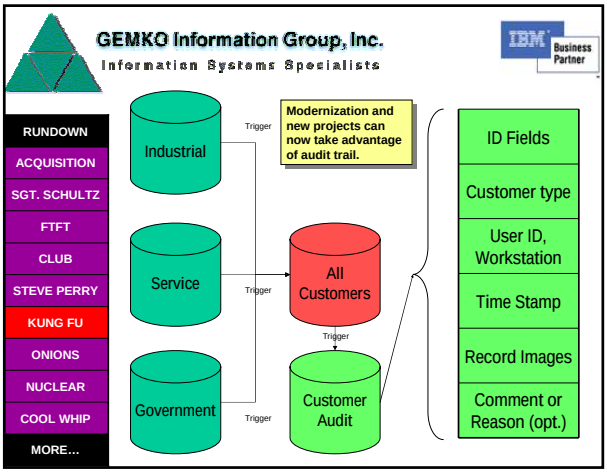
Legacy Update Programs
Legacy Update Programs
Legacy Update Programs
Industrial
Service
Government
Trigger
Trigger
Trigger
Modernized Reports, Inquiries
Feeds
All Customers
(Real Time)
Users are not disrupted, but input only apps can move forward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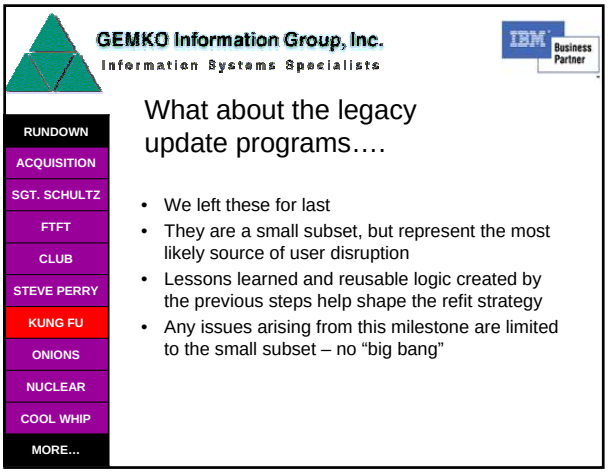
Industrial
Service
Government
Trigger
Trigger
Trigger
Trigger
Modernization and new projects can now take advantage of audit trail.
All Customers
Customer Audit
ID Fields
Customer type
User ID, Workstation
Time Stamp
Record Images
Comment or Reason (opt.)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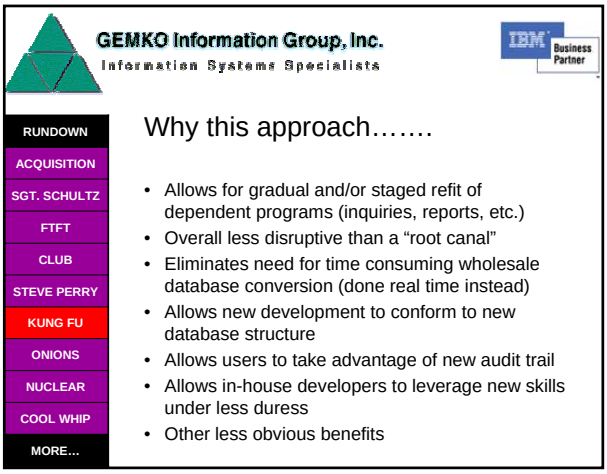
What about the legacy update programs….
• We left these for last
• They are a small subset, but represent the most likely source of user disruption
• Lessons learned and reusable logic created by the previous steps help shape the refit strategy
• Any issues arising from this milestone are limited to the small subset – no "big bang"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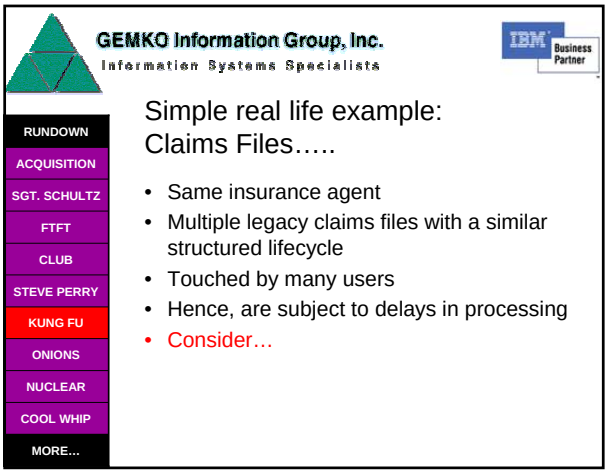
Why this approach…….
• Allows for gradual and/or staged refit of dependent programs (inquiries, reports, etc.)
• Overall less disruptive than a "root canal"
• Eliminates need for time consuming wholesale database conversion (done real time instead)
• Allows new development to conform to new database structure
• Allows users to take advantage of new audit trail
• Allows in-house developers to leverage new skills under less duress
• Other less obvious benefits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Simple real life example: Claims Files…..
• Same insurance agent
• Multiple legacy claims files with a similar structured lifecycle
• Touched by many users
• Hence, are subject to delays in processing
• Consider…

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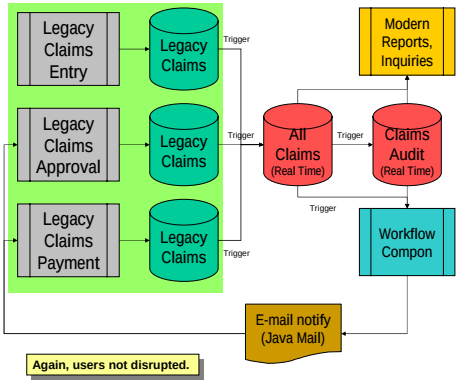

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‘Nother example…….

- Manufacturer with S/36 homegrown system with non-defined data files
- Had month end issues with G/L transactions, when it was too hectic
- Poor, inconsistent editing of transactions
- Could not troubleshoot undefined data
- Could not easily correct with editor
- Other related files get out of synch
- Consider…

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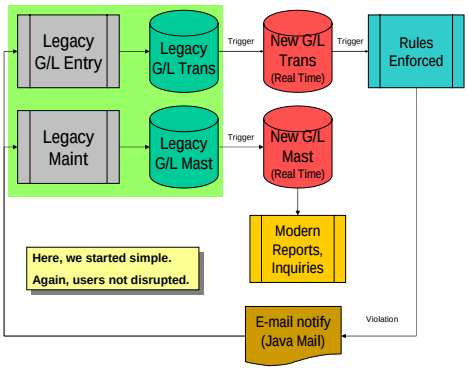

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Now wait just a darn minute !...

- You’re saying that we should waste perfectly good money to maintain 2 systems at the same time, without a deadline or a budget ?
- No, we should invest perfectly good money to assure smooth, steady improvement, minimize risk and disruption, and protect our investment altogether. We should focus on value and business case, not arbitrary targets.
- And oh, by the way…

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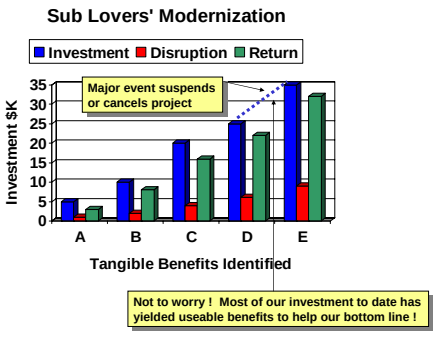

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The Pumpkin Pie…

Feature:	Analogous to:
The aroma while baking	Enjoying the benefits of modernization long before “completion”
The crust	Leadership which holds the entire process together
The filling	A delicate blend of technical and non technical ingredients
The whipped topping	The resulting improvement in customer service levels
Served in slices to be shared with others	Total team effort with many hands making light work

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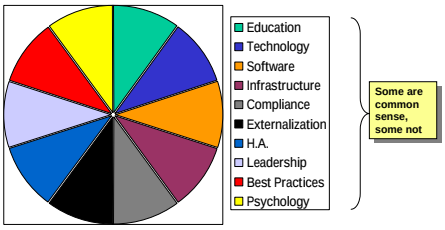
The Pumpkin Pie !

(a.k.a. the makings of a successful modernization)



Just like Mom used to make – secret ingredients made with love !

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Education…..

- Perhaps the most important, yet the most neglected ingredient
- The best software, best practices and best tooling are meaningless without the proper education to bring it to life
- Insufficient education is a major contributor to underutilization ("dead money"), and greatly adds to the cost of development and support
- What's worse – midrange developers have been left even further behind due to the stability of the platform
- Consider the IBM roadmap…

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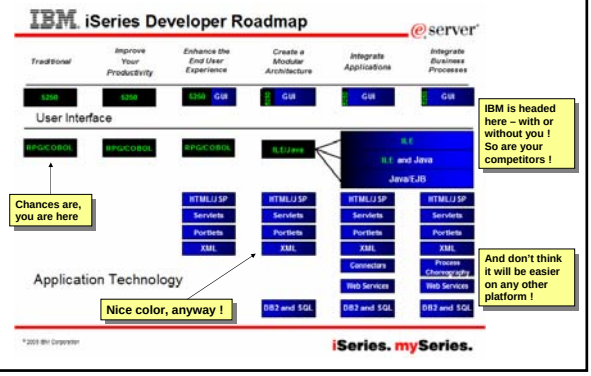

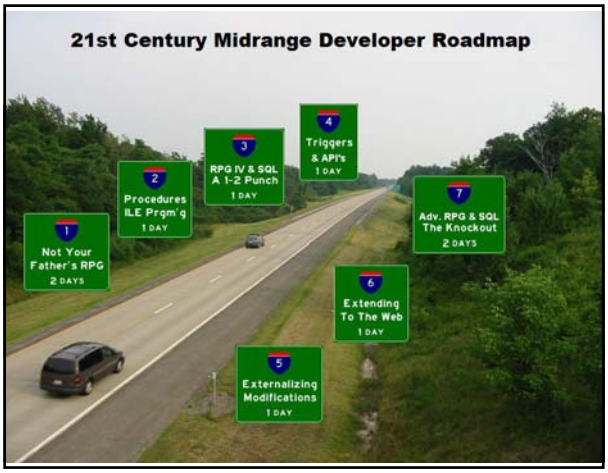

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Typical midrange developer's day

Firefighting/Troubleshooting (FFT): X%
- Fielding user distress calls, determine cause and scope, etc..
- Craft a repair strategy and hope it doesn't break something else.
- Common with patchwork systems or modified 3rd party code

Cloning/Re-inventing (CR): Y%
- Copying working code and modifying the copy for other use.
- Risk that business rules are not uniformly applied
- Adds to the cost of company policy changes

Fighting Limitations (FL): Z%
- Having to operate within the bounds of legacy technology
- Force fitting solutions into "comfort zone" techniques
- Overextended hardware

Satisfactory Productivity (SP): 100% - (X + Y + Z)
- Operating at expected efficiency based on the environment
- High percentage here doesn't necessarily mean high efficiency

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Impact of Education on Developer Throughput

	Programmers			Throughput		
	ID	Task	%Day	Avg. S&B:		$60,000
A		FFT	25%		FFT	$15,000
		CR	25%		CR	$15,000
		FL	25%		FL	$15,000
		SP	25%		SP	$15,000
		Tot	100%		Tot	$60,000
B		FFT	10%		FFT	$6,000
		CR	40%		CR	$24,000
		FL	30%		FL	$18,000
		SP	20%		SP	$12,000
		Tot	100%		Tot	$60,000
C		FFT	30%		FFT	$18,000
		CR	30%		CR	$18,000
		FL	15%		FL	$9,000
		SP	25%		SP	$15,000
		Tot	100%		Tot	$60,000
D		FFT	40%		FFT	$24,000
		CR	15%		CR	$9,000
		FL	30%		FL	$18,000
		SP	15%		SP	$9,000
		Tot	100%		Tot	$60,000
Tot		FFT	1.05		FFT	$63,000
		CR	1.10		CR	$66,000
		FL	1.00		FL	$60,000
		SP	0.85		SP	$51,000
		Tot	4.00		Tot	$240,000

What if we could improve by reducing FFT, CR and FL ?

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How a "21st Century" education can help reduce the negatives

Fighting Limitations (FL):
- Students get experience with many different technologies
- Can use whichever toolkit best solves the task at hand
- Easily mix technologies within applications

Cloning/Re-inventing (CR):
- Philosophy of defining key business rules once and only once
- Policy changes easily implemented, uniform rules enforcement
- Spend more time inventing, less time re-inventing

Firefighting/Troubleshooting (FFT):
- Ripple effect of improving FL and CR
- Higher quality applications contain fewer failure points
- Triage and correction simplified with better tooling and methods

Satisfactory Productivity (SP):
- Increases as others are reduced
- Now based on a higher standard, thus a double improvement

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Impact of Education on Developer Throughput

Programmers			Throughput		Impact of Education			Result Throughput	
ID	Task	%Day	Avg. S&B:	$60,000	ID	Task	%Chg	Result	Avg. S&B:	$60,000
A	FFT	25%	A	FFT $15,000	A	FFT	-5%	20%	A	FFT $12,000
	CR	25%		CR $15,000		CR	-5%	20%		CR $12,000
	FL	25%		FL $15,000		FL	-5%	20%		FL $12,000
	SP	25%		SP $15,000		SP	15%	40%		SP $24,000
	Tot	100%		Tot $60,000		Tot	0%	100%		Tot $60,000
B	FFT	10%	B	FFT $6,000	B	FFT	-5%	5%	B	FFT $3,000
	CR	40%		CR $24,000		CR	-5%	35%		CR $21,000
	FL	30%		FL $18,000		FL	-5%	25%		FL $15,000
	SP	20%		SP $12,000		SP	15%	35%		SP $21,000
	Tot	100%		Tot $60,000		Tot	0%	100%		Tot $60,000
C	FFT	30%	C	FFT $18,000	C	FFT	-5%	25%	C	FFT $15,000
	CR	30%		CR $18,000		CR	-5%	25%		CR $15,000
	FL	15%		FL $9,000		FL	-5%	10%		FL $6,000
	SP	25%		SP $15,000		SP	15%	40%		SP $24,000
	Tot	100%		Tot $60,000		Tot	0%	100%		Tot $60,000
D	FFT	40%	D	FFT $24,000	D	FFT	-5%	35%	D	FFT $21,000
	CR	15%		CR $9,000		CR	-5%	10%		CR $6,000
	FL	30%		FL $18,000		FL	-5%	25%		FL $15,000
	SP	15%		SP $9,000		SP	15%	30%		SP $18,000
	Tot	100%		Tot $60,000		Tot	0%	100%		Tot $60,000
Tot	FFT	1.05	Tot	FFT $63,000	Tot	FFT	-0.20	0.85	Tot	FFT $51,000
	CR	1.10		CR $66,000		CR	-0.20	0.90		CR $54,000
	FL	1.00		FL $60,000		FL	-0.20	0.80		FL $48,000
	SP	0.85		SP $51,000		SP	0.60	1.45		SP $87,000
	Tot	4.00		Tot $240,000		Tot	0.00	4.00		Tot $240,000
									Net Chg	$36,000

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Technology……

- i5 is an ideal platform for modernization
- Integrated, secure, scalable, reliable
- But eventually, even the best midrange systems get old
- The older the system, the more difficult it will be to modernize
- Hint – don't try to modernize on a model 620 to 256 meg of memory !
- As a lessee of IBM i5 hardware, you can ensure regular, predictable upgrades to state of the art hardware

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Software….

- i5/OS Comes with ALL the development tools you may EVER need, and financed by YOU !
- Also comes with DB2, security, virtualization, communications, web serving and file/print sharing built right in, and financed by YOU !
- As a licensee of 3rd party application software, you are normally entitled to new versions as they are released. This software is based on years of research and business case studies, and financed by YOU !
- So any company that lags behind in their software releases is squandering its investment !

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Infrastructure….

- A slick enterprise application deployed over a sluggish network is a sluggish enterprise application
- A company unable to web enable its applications and data is at a significant disadvantage. When you ASSUME your competitors can't…
- If employees cannot be trusted with technology (ex. Internet), why are they being trusted with your business ?
- If your policy and strategic direction is being dictated by outsiders (vendors, hackers, etc.) then perhaps THEY should be CEO.

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Compliance……..

- Privately held companies tend to lag behind
- Providing (and preserving) audit trails
- Closing back doors (ex. raw file editors)
- Taking application security a little more seriously
- Rediscovering the "D" word (documentation)
- Considering change management utilities
- Publishing standard procedures and understanding roles
- Familiarizing with backup & recovery procedures
- Reviewing/establishing privacy guidelines

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Externalization……

- Breaking the endless, destructive cycle of "bastardizing" 3rd party software
- Provide ample, equivalent custom function, based on business case, external to the software
- Facilitates a return to a quality tested, certified software products
- Re-qualify for 3rd party support
- Significantly reduces the cost and effort of implementing every subsequent release
- A separate workshop and discussion topic – "Get Those Mods Outta Here"

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H.A.……

- H.A. stands for Hard @ss
- Somebody in the organization needs to be the H.A.
- Preferable someone with a top floor corner office (ex. "The Donald")
- Enforce commitment and compliance
- Say NO to frivolous customizations
- Stay focused on the business case
- Key player in externalization projects
- Without the H.A., the burger lovers will undoubtedly take over

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Leadership…..

- Putting an end to the "turf" wars in your organization. You want "turf" ? Get larger market share, then defend that "turf" as a team.
- Recognizing that just because a task has been done a certain way for 30 years doesn't necessarily mean it is the best way
- Willingness to put emotion aside and focus on substance over sex appeal
- Fostering the sharing of ideas, innovation and constructive criticism
- Reiterating that our many hands contribute to our problems and that many must contribute to our solutions as well

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Q & A
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Best Practices….

- Writing business logic once
- Not force fitting technology simply because it is in the comfort zone
- Taking advantage of available resources (web casts, published case studies, etc.)
- Regular cleanup & archival (data, programs, documents, etc.)

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Psychology….

- The only stupid people are the ones who don't ask questions
- The only stupid questions are the ones that don't get asked
- The only stupid answers are the ones that don't have reasons behind them
- The only stupid reasons are the ones that have no business value

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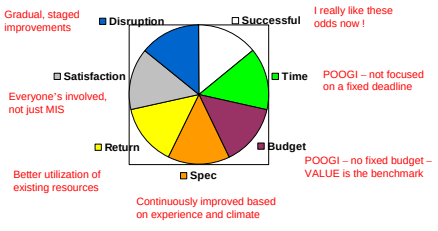
Failure is not an option…….

Why Modernization Projects Fail



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Summary…..

- Modernization is a JOURNEY, not a destination
- Not a technology solution, it's a business solution
- Taking better advantage of the resources you have
- Making a business case for small, staged improvements
- Should be a positive experience for everyone, not a root canal

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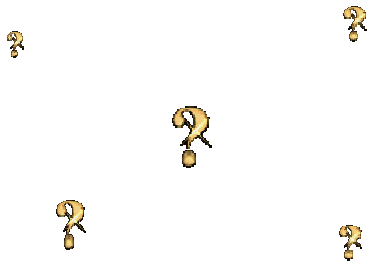
Questions ?



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Thank you for attending !

"Now, Eat Fresh !"

Christopher F. Burns, Sr.
GEMKO Information Group
cburns@gemko.com

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